

# Memorandum

**TO:** PUBLIC SAFETY, FINANCE &  
STRATEGIC SUPPORT COMMITTEE

**FROM:** Mark Danaj

**SUBJECT:** 2008-2009 SECOND QUARTER  
PERFORMANCE REPORT

**DATE:** February 9, 2009

Approved

A handwritten signature in blue ink that appears to read "Mark Danaj".

Date

2/10/09

## RECOMMENDATION

Acceptance of the attached second quarter Performance Reports from the Finance, Human Resources, Information Technology, Public Works, and Retirement Departments.

## BACKGROUND

In his December 22, 2006 memorandum, Mayor Reed intended for Council Committees to integrate into their workplans, a regular review of ten to twenty key performance measures for pertinent departments and City Service Areas to assist committee members in providing informed oversight. For the PSFSS Committee, those departments are Finance, Human Resources, Information Technology, Public Works, and Retirement Services. Management Partners was retained by the City Manager's Office to facilitate the development of a recommended list of performance measures for regular review by the committee.

Selection of key measures was based on:

- Alignment with City Council goals and priorities and Committee mission
- Issues of public interest/concern
- Service delivery outcomes and customer service orientation
- Input from staff and review of documents, including availability of data
- Areas of significant resource investment
- Comparability to performance measures used by other jurisdictions

Performance data will be provided in four quarterly committee reports each year. Performance Reports will include quarterly measures with semiannual, annual, and biennial measures added as data is available. Any highlights or major variances will also be explained. The attached Performance Reports include those measures that were approved by the Public Safety, Finance and Strategic Support Committee at the June 2007 meeting.

## ANALYSIS

Overall, second quarter performance is tracking at anticipated levels across departments. Exceptions are noted below along with key performance information by department.

### Finance Department

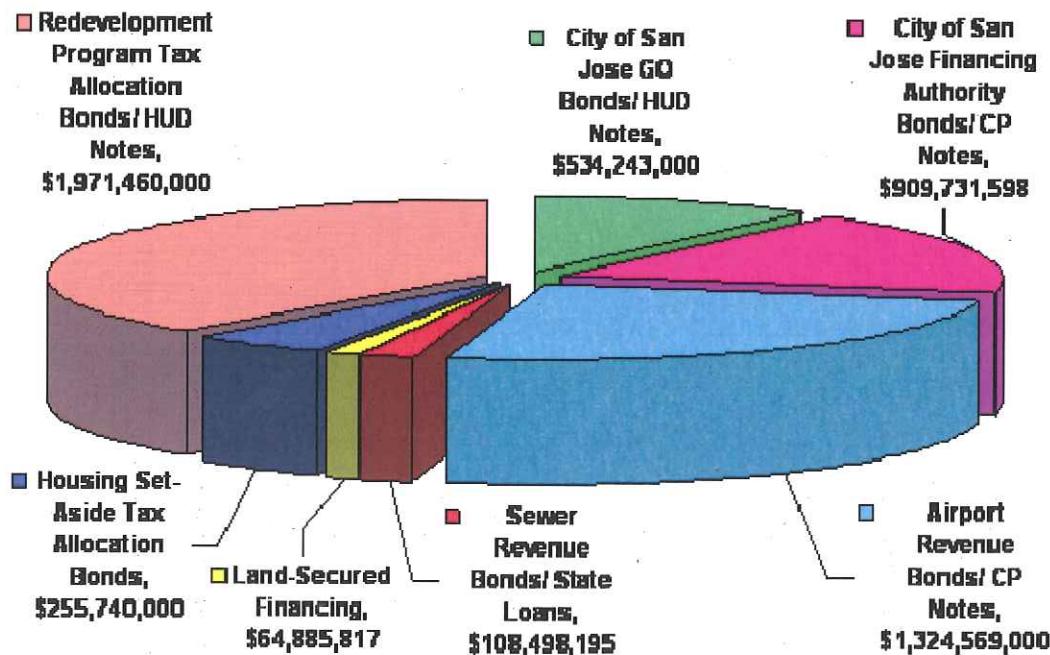
#### *Performance Discussion*

##### Average return on investments (3.91%)

The average return on investments for the second quarter of 2008-2009 was 3.91% (as compared to 3.89% for the first quarter of FY 08/09). The investment portfolio return for the remainder of the fiscal year will decline due to decreasing market interest rates. During the mid-year process Finance decreased its target for 2008-2009 to 3.72%.

##### Total debt portfolio managed (\$5,767,390,648)

During the second quarter of 2008-2009, the debt portfolio increased by \$138,995,956, primarily due to the issuance of Redevelopment Agency tax allocation bonds and City and Airport commercial paper notes offset by scheduled debt retirement. The pie chart below shows the composition of the City's debt portfolio, including \$5,169,127,610 of debt issued by the City and related entities, but does not include \$598,263,039 of conduit debt issued on behalf of affordable housing developers.



## **Human Resources**

### *Performance Discussion*

**Turnover rates: public safety (5.15%), non-public safety (5.38%), overall (5.30%)**

During the second quarter, the public safety, non-public safety and overall turnover rate were slightly higher than the second quarter of 2007-2008 (4.26% in each case). This was due to an increased number of retirements. It is anticipated that the third quarter turnover rate will be much higher than the second quarter, as the trend has shown in the past that many employees tend to retire right before the COLA (cost of living adjustment) for Retirement, which occurs in February for public safety and in April for non-public safety.

**# of workers' compensation claims per 100 FTE's: Sworn (8.5), Non-Sworn (1.5)**

During the second quarter, there was minimal change in Workers' Compensation claims per 100 FTE's for sworn and non-sworn (as compared to FY 2007-08 second quarter figures: 7.8 for Sworn and 1.6 for Non-Sworn). Overall, the number of claims per 100 FTE's continued to track at FY 2008-09 target levels for Sworn and slightly below target levels for Non-Sworn.

**# of worker days lost per workers' compensation claim: Sworn (11.7), Non-Sworn (13.7)**

During the second quarter, there was minimal change in number of lost days per injury for sworn and a slight increase for non-sworn (as compared to FY 2007-08 second quarter lost days: 11.9 for Sworn and 9.3 for Non-Sworn).

**Average number of days per recruitment: external (112)**

With minimal internal postings, the average number of days per external recruitment is the lone measure used as of the first quarter. The second quarter average of 112 days was slightly lower than the targeted 120 days. The first quarter reported average of 96 days was incorrectly reported as 131 days.

**# of new job postings: external (48)**

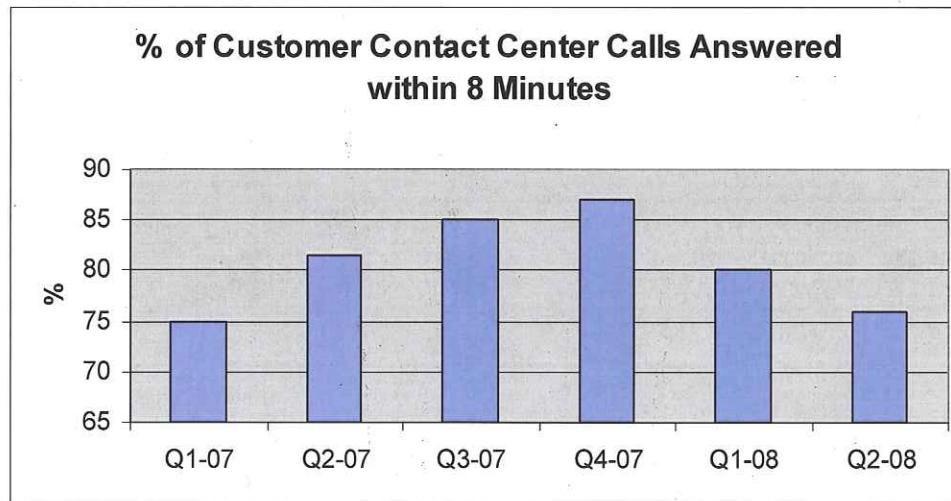
External postings are now the default, with negligible internal postings as of the first quarter. The number of external postings is projected to be under the FY 2008-09 target of 300 postings.

**% increase in respondents from diversity outreach**

Human Resources is developing a tracking system to gather results from diversity outreach for executive-level recruitments. Data should be available at the end of the next year.

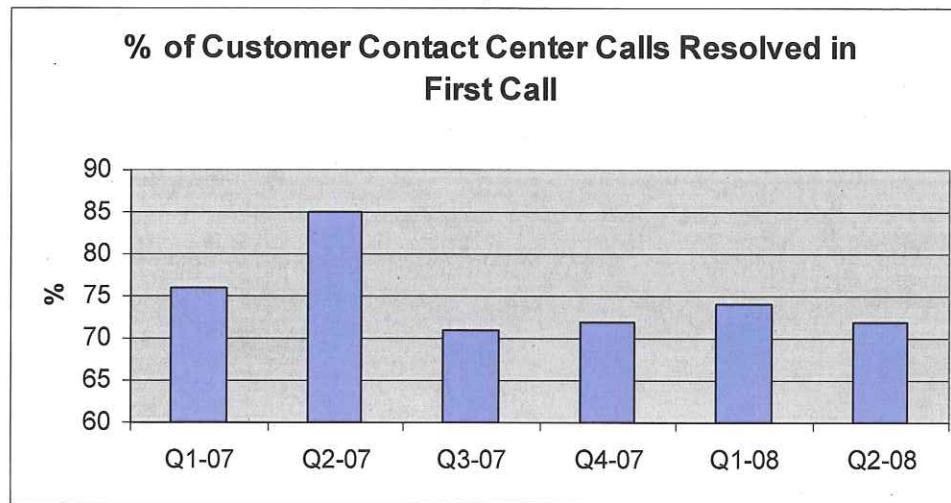
**Information Technology***Performance Discussion***% of Customer Contact Center calls answered within 8 minutes (76%)**

The Customer Contact Center answers all calls from customers concerning Utility Billing (handled by the Integrated Billing System (IBS) system), as well as all other calls to the City. The Chief Information Officer and staff oversee the Customer Contact Center, including training of Customer Service Representatives in IBS, software enhancements, and development of quality-control processes for call takers. Foreclosures and liens have increased due to the economic downturn. Consequently, calls have become more complex, causing a decline in % of calls answered within 8 minutes. However, performance is still above the target of 75% for the year.



**% of Customer Contact Center calls resolved within the first call (72%)**

% of Customer Contact Center calls resolved within the first call has declined slightly during Q2 over the previous quarter. Foreclosures and liens have increased as a result of the economic downturn. Most of these calls must be referred to Finance for resolution, so cannot be resolved in the first call.

**Public Works****On-Budget Performance Measure: 89%**

At the close of Q2 FY08-09, Public Works continued its upward improvement of On-Budget performance from 74% to 89%, nearly attaining the 90% target. The improvement may be attributed to the continued commitment toward the implementation of Best Management Practices (BMPs) for project delivery, as well as increased diligence with respect to cost estimating techniques and the timing for setting baseline budgets relative to scope development.

It should be noted that due to the variability in project size and scheduling in the various Capital Improvement Programs, the total construction cost of the projects completed in Q1 and Q2 was \$21 million which is significantly less than the \$49 million total construction cost of projects completed in Q3 and Q4 of FY07-08.

**On-Time Performance Measure: 87%**

At the close of Q2 FY08-09, Public Works improved its On-Time performance from 73% to 87% and thereby exceeded its 85% target. As with On-Budget Performance, the improvement may be attributed to the implementation of Best Management Practices (BMPs), as well as staff prudence in setting realistic baseline schedules when making project delivery commitments.

It should be noted that due to the variability in project scheduling in the various Capital Improvement Programs, 47 projects were delivered in Q1 and Q2, which is significantly more than the 26 projects delivered in Q3 and Q4 of FY07-08.

**Operations and Maintenance Measure: N/A**

This performance measure is evaluated annually and will be done accordingly at the end of FY08-09.

**Customer Satisfaction Measure: N/A**

This performance measure is evaluated annually and will be done accordingly at the end of FY08-09.

**Retirement Services**

*Performance Discussion*

Average return on Police and Fire Department Retirement Plan's investment portfolio: (-9.6%)

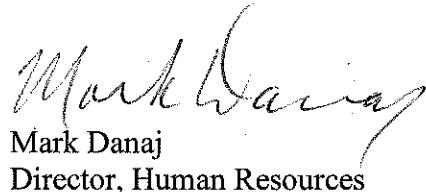
Average return on Federated City Employees' Retirement System's investment portfolio: (-9.1%)

The Police and Fire Department Retirement Plan ("P&F") and the Federated City Employees' Retirement System ("Federated") underperformed their benchmark for the quarter ending September 30, 2008 by 80 basis points and 210 basis points, respectively (one basis point is 1/100 of a percentage point). The return for the quarter is attributed to the decline in the public investment market. Longer term, the P&F Plan underperformed its actuarially assumed rate of 8.0% at one, three, and five years, annualized. The Federated Plan also underperformed its actuarially assumed rate of return of 8.25% at one, three, and five years, annualized. The P&F Plan ranked in the 79<sup>th</sup> percentile and the Federated Plan ranked in the 61<sup>st</sup> percentile second quartile in the quarter ending September 30, 2008.

Second quarter, FY 2008-09 data will be available next quarter.

**COORDINATION**

Preparation of this memorandum was coordinated with the Finance, Human Resources, Information Technology, Public Works, and Retirement Departments and the City Manager's Budget Office.

  
Mark Danaj  
Director, Human Resources

For questions, contact:

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Information Technology – Sherri Millick, Administrative Officer – 535-3563

Public Works – Barry Ng, Division Manager – 535-8477

Retirement – Donna Busse, Deputy Director – 392-6704



Performance Report  
**Public Safety, Finance & Strategic Support Committee**  
Finance Department

Reporting Period: October 1, 2008 – December 31, 2008

Prior Annual Actuals	2007-2008 Quarterly Actuals			2008-2009 Performance		
	2006-2007 Actual	2007-2008 (Jul-Sept)	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2008-2009 (Jul-Sept)	2008-2009 (Oct-Dec)
Prior Annual Actuals						
2006-2007 Actual	2007-2008 (Jul-Sept)	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2007-2008 (Apr-Jun)	2008-2009 (Jul-Sept)	2008-2009 (Apr-Jun)

**Quarterly**

**Goal: Develop, manage and safeguard City's fiscal resources**

1. Average return on investments	4.702%	4.474%	4.712%	4.712%	4.459%	4.053%	3.886%	3.910%	3.898%	3.910%	✓
- Total debt portfolio managed	\$4,630,48 9,588	\$5,621,40 5,819	\$5,368,11 0,460	\$5,594,34 6,648	\$5,553,517, 257	\$5,621,4 0,819	\$5,628,39 4,692	\$5,737,39 0,648	\$5,767,3 90,648	\$5,7 B	✓

**Goal: Manage and safeguard City's fiscal resources**

2. % of payroll checks processed accurately and on time	76%	93%	92%	94%	95%	92%	97%	96%		97%	90%
3. % of financial reports that are accurate and on time	99%	99%	99%	100%	99%	99%	100%	100%		100%	98%
4. % of vendor invoices accurately paid within 30 days	64%	64%	65%	67%	63%	69%	64%	71%		67%	63%
5. % of City's total balance of miscellaneous accounts receivable that is past due	89%	89%	89%	89%	89%	89%	63%	43%		53%	89%
6. Average # of days active accounts receivable are past due	75	61	60	49	65	69	40	92		66%	65 ✓

	Prior Annual Actuals			2007-2008 Quarterly Actuals			2008-2009 Performance			Discuss
	2006-2007 Actual	2007-2008 (Jul-Sept) Actual	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2007-2008 (Apr-Jun)	2008-2009 (Oct-Dec)	2008-2009 (Jul-Sept)	2008-2009 (Jan-Mar)	2008-2009 (Apr-Jun)	

## Quarterly (Cont'd.)

### Goal: Enhance delivery of quality City services

7. % of purchase orders processed within established time frames	63%	65%	71%	57%	66%	63%	100%	59%	71%	70%
- 8 business days for POs ≤ \$10,000										
- 26 business days for POs > \$10,001 and ≤ \$100,000	81%	76%	81%	73%	79%	66%	75%	71%	73%	80%
- 38 business days for POs > \$100,001 and ≤ \$250,000	78%	69%	67%	62%	90%	67%	81%	79%	80%	75%
- 83 business days for POs > \$250,001 and ≤ \$1.0 million	100%	96%	100%	100%	100%	88%	100%	100%	100%	90%
- 108 business day for POs > \$1.0 million	100%	83%	100%	50%	100%	N/A	N/A	N/A	0%	73%

## Annual

### Goal: Develop, manage and safeguard City's fiscal resources

1. City's General Obligation Bond Rating: - Moody's - Standard & Poor's - Fitch	Aa1 AA+ AA+	Aa1 AAA AA+	ANNUAL	ANNUAL	ANNUAL	ANNUAL	ANNUAL	ANNUAL	Aa1 AAA AA+	Aa1 AA+ AA+
2. Cost of investment services as % of City's total investment portfolio	0.112%	0.136%	ANNUAL	ANNUAL	ANNUAL	ANNUAL	ANNUAL	ANNUAL	0.107%	.17%

### Goal: Manage and safeguard City's fiscal resources

3. Cost of revenue collection services as % of City's total revenues actively invoiced	28.238%	27.744%	ANNUAL	ANNUAL	ANNUAL	ANNUAL	ANNUAL	ANNUAL	9.305%	37.38%
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4. % of cost savings achieved through the centralized purchasing process	4%	5%	ANNUAL	5%	6%						
- Total cost savings	\$3,930,410	\$5,685,309	ANNUAL	\$3,524,752	\$5.8M						

Prior Annual Actuals	2007-2008 Quarterly Actuals			2008-2009 Performance		
	2006-2007 Actual	2007-2008 (Jul-Sept) Actual	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2008-2009 (Oct-Dec) (Jul-Sept)	2008-2009 (Apr-Jun) (Jan-Mar)

#### Annual (Cont'd.)

#### Goal: Enhance delivery of quality City services

5. % of customers satisfied with parts, supplies, and services obtained through purchasing division	75%	66%	ANNUAL	TBD	70%						
6. % of customers who rate financial reports as good or excellent on a 5-point scale based on accuracy, clarity, timeliness, usefulness and availability in desired format	83%	79%	ANNUAL	TBD	79%						



## Performance Report

# Public Safety, Finance & Strategic Support Committee Human Resources Department

**Reporting Period: October 1, 2008 – December 31, 2008**

Prior Annual Actuals	2007-2008 Quarterly Actuals			2008-2009 Performance		
	2007-2008 (Jul-Sept)	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2007-2008 (Apr-Jun)	2008-2009 (Jul-Sept)	2008-2009 (Oct-Dec)
2006-2007 Actual						

## Semi-Annual

### Goal: Develop, manage and safeguard City's human resources

1. Turnover rates: - Public Safety - Non-Public Safety - Total	3.74% 7.62% 6.27%	4.18% 6.99% 6.00%	1.82% 6.31% 4.70%	4.26% 4.26% 4.26%	6.84% 11.79% 10.06%	3.48% 6.39% 5.38%	5.15% 5.38% 5.30%	6.90% 6.26% 6.48%	6.02% 5.82% 5.89%	8.00% 7.00% 7.00%	✓
2. % of hiring managers rating probationary employees as meets standard or above	98.13%	96.29%	97.39%	95.34%	95.04%	97.40%	98.03%	98.31%			
3. # of workers' compensation claims per 100 FTEs: <sup>1</sup>	35.1 9.6	35.6 7.9	8.1 2.5	7.8 1.6	9.9 2.2	9.8 1.6	7.0 2.1	8.5 1.5			
-# of new claims filed: <sup>1</sup>	757 449	781 355	162 111	197 65	212 104	210 75	151 102	185 74			
- Total # of open claims: <sup>1</sup>	2,924 1,281	2,953 1,323	2,946 1,283	2,983 1,294	3,023 1,318	2,953 1,323	2,894 1,267	3,013 1,372			
4. # of worker days lost per workers' compensation claim: <sup>1</sup>	23.8 19.3	19.5 11.9	13.8 5.1	11.9 9.3	18.3 8.7	31.6 29.6	14.0 5.9	11.7 13.7			
									12.7 9.2	23.0 <sup>2</sup> 16.0 <sup>2</sup>	✓

<sup>1</sup>All 2008-2009 workers' compensation claims tracking information included in this report relies on an estimate for incurred but not reported (IBNR) claims. Workers' Compensation claims sometimes take several weeks to register in the City's workers compensation tracking system. This lag time results from the date on which an injury is suffered and the date on which the associated paperwork reaches Human Resources and is entered into the workers' compensation tracking system. Risk Management estimates IBNR at 3.5% above and beyond reported claims in a current fiscal year. Asterisked data in this report includes that 3.5% inflationary figure to most accurately reflect total claims in the current fiscal year. As directed by Council Committee, figures are now reported by sworn and non-sworn employee affiliation and an updated report was produced at Council request as of 10/1/07. Actual reporting of lost time, new and open claims varies dependent upon report generation date.

<sup>2</sup> The average of the two targets presented in this report is higher than the combined target reported in the 2008-2009 Adopted Budget (17.0) as lost days usage figures are weighted by actual days used by sworn and non-sworn employees. Sworn employees tend to need more lost days on average per claim than non-sworn, however, the large number of non-sworn employees citywide weights the total citywide average down to a final combined target of 17.0.

Prior Annual Actuals	2007-2008 Quarterly Actuals				2008-2009 Performance			
2006-2007 Actual	2007-2008 (Jul-Sep)	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2007-2008 (Apr-Jun)	2008-2009 (Jul-Sep)	2008-2009 (Oct-Dec)	2008-2009 (Jan-Mar)	2008-2009 (Apr-Jun)
								Discuss

## Semi-Annual (Cont'd.)

### Goal: Develop, manage and safeguard City's human resources (cont'd.)

5. Expenditures for workers' compensation per \$100 of total jurisdiction salaries and benefits	\$3.91	\$3.85	\$3.74	\$3.96	\$3.43	\$4.23	\$3.80	\$3.63	\$3.80	\$4.20
- Total claims costs:										
- Sworn	\$10.3M	\$10.9M	\$10.5M	\$10.9M	\$2.5M	\$2.8M	\$2.4M	\$3.2M	2.8M	\$10.4M
- Non-sworn	\$5.0M	\$4.4M	\$1.0M	\$1.2M	\$1.0M	\$1.2M	\$1.0M	\$1.3M	0.8M	\$5.8M

### Goal: Enhance delivery of quality City services

1. Average # of days per recruitment:	81	92	77	82	102	108	96	112		
- Internal	99	121	112	122	130	120				
- External									105	120 <sup>3</sup>
2. # of new job postings:										
- Internal	315	327	150	103	45	29	65	48		
- External	212	217	44	58	62	53			113	300 <sup>3</sup>

### Annual

### Goal: Develop, manage and safeguard City's human resources

1. % of hiring managers who believe that candidates (or candidate pools) are "prepared" or "well prepared" to perform successfully in positions they are seeking	New	New	ANNUAL	TBD						
2. % of supervisory employees who are graduates of the Leadership and Supervision Academy	32.4%	TBD	ANNUAL	75%						
3. % increase in respondents from diversity outreach	New <sup>4</sup>	N/A <sup>5</sup>	ANNUAL	TBD						

<sup>3</sup> External posting is now the default. Very few postings are internal only.

<sup>4</sup> Data should be available next quarter.

<sup>5</sup> Human Resources is developing a tracking system to gather results from diversity outreach for executive-level recruitments. Data should be available next quarter.

	Prior Annual Actuals		2007-2008 Quarterly Actuals						2008-2009 Performance					
	2006-2007 Actual	2007-2008 Actual	2007-2008 (Jul-Sept)	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2007-2008 (Apr-Jun)	2008-2009 (Jul-Sept)	2008-2009 (Oct-Dec)	2008-2009 (Jan-Mar)	2008-2009 (Apr-Jun)	2008-2009 YTD	2008-2009 Target	Discuss	
	<b>Biennial</b>													
1. % of participants rating benefit program products and services as good to excellent	New <sup>6</sup>	New <sup>6</sup>	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	TBD		
- # of non-retirement employee benefit programs administered	22 <sup>6</sup>	TBD <sup>6</sup>	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	TBD		

#### Goal: Develop, manage and safeguard City's human resources

	Goal: Develop, manage and safeguard City's human resources (Cont'd.)												
	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL	BIENNIAL
2. % of employees who rate their overall satisfaction with Human Resources services as satisfied or very satisfied	41%	41% <sup>6</sup>	BIENNIAL	41%									
3. % of employees rating the effectiveness of training classes as "good" or "excellent" in meeting their principal training objective	96%	N/A	BIENNIAL	95%									
- Current Job	93%	N/A											95%
- Career Development	N/A <sup>7</sup>	N/A											95%
- Personal Growth		N/A											95%
-# of training classes offered	148	97	BIENNIAL	100									
-# of training attendees	1,038	1,551	BIENNIAL	1,100									
4. % of supervisors rating the effectiveness of training classes as "good" or "excellent"	New <sup>6</sup>	New <sup>6</sup>	BIENNIAL	85%									

<sup>6</sup> New measure to be included in the 2008 Employee Survey.

<sup>7</sup> Insufficient data to report for 2007-2008. Baseline measures will be determined in 2008-2009.



**Performance Report**  
**Public Safety, Finance & Strategic Support Committee**  
**Information Technology Department**

**Reporting Period: October 1, 2008 – December 31, 2008**

	Prior Annual Actuals			2007-2008 Quarterly Actuals			2008-2009 Performance					
	2006-2007 Actual	2007-2008 Actual	2007-2008 (Jul-Sept)	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2007-2008 (Apr-Jun)	2008-2009 (Jul-Sept)	2008-2009 (Oct-Dec)	2008-2009 (Jan-Mar)	2008-2009 (Apr-Jun)	2008-2009 YTD	2008-2009 Target
<b>Quarterly</b>												
1. % of Customer Contact Center calls answered within 8 minutes	64%	82.1%	74.9%	81.5%	85%	87%	80%	76%		78%	75%	✓
- # of Customer Contact Center calls received	321,294	327,351	92,348	94,287	69,178	71,538	79,943	71,662		151,605	320,000	
2. % of Customer Contact Center calls resolved within the first call	79%	76%	76%	85%	71%	72%	74%	72%		73%	80%	✓

**Goal: Enable and enhance delivery of quality City services**

1. % of Customer Contact Center calls answered within 8 minutes	64%	82.1%	74.9%	81.5%	85%	87%	80%	76%		78%	75%	✓
- # of Customer Contact Center calls received	321,294	327,351	92,348	94,287	69,178	71,538	79,943	71,662		151,605	320,000	
2. % of Customer Contact Center calls resolved within the first call	79%	76%	76%	85%	71%	72%	74%	72%		73%	80%	✓

**Goal: Develop, manage and safeguard City's technological resources**

3. % of time enterprise systems are available during normal business hours:	99.995%	99.99%	99.47%	100%	100%	100%	100%	100%		97.10%	99.6%	98.88%
- E-mail	99.865%	100%	100%	100%	100%	98.88%	99.68%	99.98%		99.89%	99.93%	99.93%
- Financial management	99.18%	99.2%	99.64%							98.55%	99.745%	100%
- Human Resource/Payroll										99.95%	99.95%	99.95%
4. % of network services available 24x7	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW		99.64%	99.64%	100%
- Converged City network	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW		99.95%	99.795%	100%
- Telephones										99.95%	99.95%	99.95%
- Enterprise Servers										99.95%	99.95%	99.95%

# of network outages during business hours <sup>1</sup>	7	3	1	0	1	1	2	2		4	2	
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Prior Annual Actuals	2007-2008 Quarterly Actuals			2008-2009 Performance							
	2006-2007 Actual	2007-2008 (Jul-Sept)	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2007-2008 (Apr-Jun)	2008-2009 (Oct-Dec)	2008-2009 (Jul-Sep)	2008-2009 (Apr-Jun)	2008-2009 (Jan-Mar)	YTD	2008-2009 Target
<b>Annual</b>											

### Goal: Enable and enhance delivery of quality City services

1. % of total customer response with good or excellent rating on:											
- Timeliness	80%	80.19%	ANNUAL								
- Quality of service	68%	74.92%									
- Availability of network services	67%	55.25%									

### Goal: Develop, manage and safeguard City's technological resources to enable delivery of quality City services

1. % of managers who say employees have the technology tools they need to support their service delivery functions	70.59%	69.85%	ANNUAL								
2. % of employees who say they have the technology tools they need to meet their service delivery functions	82.14%	60.94%	ANNUAL								

<sup>1</sup> Network outage may mean a small group of users. It is not necessarily an outage of the entire network



**Performance Report**  
**Public Safety, Finance & Strategic Support Committee**  
**Public Works Department**

**Reporting Period:** July 1, 2008 – December 31, 2008

	Prior Annual Actuals		2007-2008 Semi-Annual Actuals		2008-2009 Performance		2008-2009 YTD	2008-2009 Target	Discuss
	2006-2007 Actual	2007-2008 Actual	July 2007 to December 2007	January 2008 to June 2008	July 2008 to December 2008	January 2009 to June 2009			
<b>Semi-Annual</b>									

**Goal: Infrastructure improvement**

1. % of projects completed within the approved baseline budget by operational service	69%	74%	81%	72%	89%		89%	90%	✓
- Total construction cost of projects	\$135M	\$168M	\$119M	\$49M	\$21M		\$21M	\$88M	
2. % of projects designed and constructed by Public Works within approved baseline schedule by operational service	77%	73%	71%	77%	87%		87%	85%	✓
- # of construction projects delivered	69	64	38	26	47		47	84	

**Annual**

1. % of operations and maintenance divisions rating new or rehabilitated capital facilities as being functional and sustainable after the first year of commissioning or use	80%	TBD	ANNUAL	ANNUAL	ANNUAL	ANNUAL	ANNUAL	TBD	80%	✓
2. % of customers rating design and construction services as good or better based on accuracy, timeliness, and quality of final product	100%	94%	ANNUAL	80%						



Performance Report  
**Public Safety, Finance & Strategic Support Committee**  
Retirement Department

Reporting Period: July 1, 2008 – September 30, 2008

Prior Annual Actuals	2007-2008 Quarterly Actuals				2008-2009 Performance							
	2007-2008 Actual	2007-2008 (Jul-Sept)	2007-2008 (Oct-Dec)	2007-2008 (Jan-Mar)	2007-2008 (Apr-Jun)	2008-2009 (Jul-Sept)	2008-2009 (Oct-Dec)	2008-2009 (Jan-Mar)	2008-2009 (Apr-Jun)	2008-2009 YTD	2008-2009 Target	Discuss
<b>Quarterly</b>												

**Goal: Develop, manage and safeguard City's fiscal resources**

1. Average return on retirement funds' investment portfolios <sup>1</sup>	P&F: 19.3%	P&F: (5.1)%	P&F: 2.4%	P&F: (0.4)%	P&F: (6.9)%	P&F: (0.4)%	P&F: (0.4)%	P&F: (9.6)%				✓
1. Average return on retirement funds' investment portfolios <sup>1</sup>	FED: 16.2%	FED: (3.1)%	FED: 4.32%	FED: (0.42)%	FED: (5.01)%	FED: 0.0%	FED: (9.1)%			FED	8.25%	✓

**Annual**

**Goal: Safeguard City's human and fiscal resources**

1. % of boards and members that rate department services as very good or excellent based on accuracy and usefulness of work	85%	85%	ANNUAL	85%								
-# of members served	1853	2000	ANNUAL	2000								

<sup>1</sup> Data for the previous quarter is not available until 6 weeks after the end of the previous quarter.